The Commonwealth of Kentucky
kynect State-Based Marketplace

Organization Administrator Training Guide

November 5, 2021

Document Control Information

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Introduction

The Organization Administrator Training provides new Organization Administrators with an overview of the KHBE kynector Program and explains the roles and responsibilities of the Organization Administrator position.

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1 Organization Administrator Training: Course Introduction

The Organization Administrator Training covers the responsibilities and duties that Organization Administrators must perform, including supervising kynectors in their organizations, managing Kentucky Online Gateway (KOG) access, overseeing kynector outreach efforts and enrollment events, and escalating issues as needed.

2 Who is an Organization Administrator?

Organization Administrators act as the primary liaison between their contracted organization and KHBE, and as the main point of contact for KHBE regarding contractual requirements.

2.1 Organization Administrator Responsibilities

The role of the Organization Administrator has responsibilities beyond that of a kynector. Organization Administrator responsibilities include the following:

Administrative Duties	Recruitment	Reporting

Administrative duties refer to tasks and activities including:
 	
• Onboarding kynectors
• Monitoring kynectors' training status
• Adding/removing kynectors from Kentucky Online Gateway (KOG)
• Reassigning associated cases
• Language/messaging on materials
	Recruitment efforts aim to have a diverse employee base that is reflective of the communities served based on (but not limited to) the following:
	
	• Race
	• Ethnicity
	• Sexual orientation
	• National origin
	• Disability
	• Age
		Reporting provides data-driven feedback on outreach and enrollment goals using KHBE provided templates/reports. Organizations Administrators are responsible for collecting and distributing reports. These include:
		
		• Event Reporting Data:
		  o Monthly Event Request Templates (required from contracted Organization Administrators only)
		  o Monthly Event Photos
		  o Monthly metrics
		
		• Financial Reporting Data:
		  o Purchase requests
		  o Property control ledger
		  o Timesheets
		
		• Monthly Consumer Satisfaction Survey Results (required from contracted Organization Administrators only)

2.2 Metrics Reporting Guidelines

The following data elements are included in the Metrics Report:

- Reporting period month/quarter
- Data report submitted to KHBE
- Organization name
- Organization Administrator
- Entity name
- Region
- County
- Medicaid/QHPs or KCHIP

2.3 Metrics Reporting Section

The Metrics Report documents kynectors' and Organization Administrators' progress in facilitating enrollment and conducting outreach activities.

Metrics Reporting Section	Description
Section 1: Coverage Model	- Number of Applications started - Applications completed (Medicaid eligible) - Types of other Applications completed - Type of other enrollments - Applications completed (QHP eligible) - Enrollments completed for QHP - Applications in-progress (outstanding as of last day of reporting period) - Medicaid re-certifications (this number is included in the month that the renewal was confirmed, NOT the renewal effective date month) - QHP renewals (this number is included in the month that the renewal was confirmed, NOT the renewal effective date month) - Total drive time (in hours) - Locations that require driving
Section 2: Focus	- Number of Blacks/African Americans enrolled - Number of Latinx enrolled - Number of Others enrolled - Number of enrollment related contacts - Number of hours spent on enrollment assistance - Number of outreach and education related contacts - Number of referrals sent and type of referral

	• Number of referrals received
Section 3: Outreach and Enrollment	• Number of community events attended for kynector duties • Number of hours spent at community events • Number of office hours held • Number of hours spent on outreach and education • Number of overtime hours • Number of presentations made • Number of locations where outreach materials were disseminated • Number of appointments with Individuals • Number of direct (phone or in-person) contacts with Individuals
Section 4: Operations (complete only once per county)	• Number of reported privacy and security incidents
Section 5: Talent Management	• Number of kynectors trained and certified • Average consumer satisfaction rating
Section 6: Cost-Effectiveness	• Total funds used on enrollment activities for the reporting month • Total funds used on enrollment activities year to date (YTD) • Total funds used on outreach activities • Total funds used on outreach activities year to date (YTD)

2.4 Certified Application Counselors (CAC) Quarterly Reports

Each quarter, CACs record their activities into the CAC Reporting Template. Every quarter CACs submit these reports to the KHBE general mailbox at KHBE.Program@ky.gov. KHBE staff review these reports to evaluate the overall performance and effectiveness of the CACs' activities. **Each organization must turn in the report by the 15th of the month following the end of the quarter** (example: Q1 would be due April 15). **In the report, there are five main criteria recorded**. These criteria include:

- Coverage Model
- Focus
- Outreach and Enrollment
- Operations
- Talent Management

Please note: CACs are to use the **Metrics Reporting Guidance** document which will assist with the Quarterly Metrics Report.

2.5   kynect Reports Navigation

The following navigation steps walk Organization Administrators through best practices for accessing reports in kynect.

1. Use the **Advanced Search** to input the appropriate criteria for the report. Click **Show Advanced Search**.

2. To start, select the **Enrollment Status** we are looking for in our report. Click the **Enrollment Status** drop-down.

8

3. Select the **Complete** option from the drop-down.

Search

The Enrollment Status selected will list the Individuals who have that status in the kynect Report.

Selecting **Complete** means only Individuals with completed enrollments will be displayed in the kynect Report.

Organization Administrators may want to view a kynector's enrollments that are incomplete. To view these, select the **No Plan Selected** option.

For this example, select **Complete.**

Select the **Complete** option from the drop-down.

4. Select the **Submitted Date** from the drop-down that needs to be displayed in the report.

Search

Now select the **Submitted Date** that needs to be displayed in the report. Organization Administrators should confirm kynectors' metrics periodically for accuracy.

Click the **Submitted Date** drop-down.

5. Select the **Last 1 month** from the drop-down.

The **Submitted Date** drop-down has different time frames to select from.

Please note: These time frames are exact. For example, the **Last 1 month option** pulls data from the past 30 days. The **Last 3 months** option pulls data from the last 90 days. Organization Administrators will need to be aware of this when accessing these reports.

Select the **Last 1 month** from the drop-down.

6. Organization Administrators can narrow their search results by adding in additional search criteria, if needed, through the **Advanced Search**. Click **Search**.

Organization Administrators can narrow their search results by adding in additional search criteria from the available drop-downs, if needed, through the **Advanced Search**.

Click **Search**.

7. To narrow down the search, select the specific kynector to review from the **Assisted By** drop-down.

Please note: Organization Administrators should be aware that kynect Reports can only hold up to **200** clients assisted.

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8. Once the kynector has been selected, click **Search**.

9. Click **Export to Excel**.

10. The Excel file download will appear on your screen. Click **Open File**.

11. This concludes the kynect Reports Navigation. Click **Exit**.

3   What is Kentucky Online Gateway (KOG)

The Kentucky Online Gateway (KOG) allows Residents and kynectors to easily access multiple state-based systems using a single sign-on. This prevents users from having to manage multiple sets of usernames and passwords across multiple applications.

Welcome to the Kentucky Online Gateway

- Are you doing business in or with the Commonwealth of Kentucky?

- Are you a citizen or resident applying for or receiving benefits?

- Are you seeking government services from the Commonwealth?

If you answered "Yes" to any one of these questions, please sign into your existing Kentucky Online Gateway account or click on the button below to create an account.

SIGN IN   **CREATE ACCOUNT**

3.1   KOG Roles

Organization Administrators are able to assign and change user roles within KOG. The user roles that Organization Administrators are able to assign and change are listed below.

3.2   KOG Glossary Roles

See below a list of roles that can be assigned by an Organization Administrator in KOG:

Role	Application	Description
Agency Admin	Self-Service Portal	Agency Administrator is a kynect benefits role that grants the user a manager's level of access. This role should be given to a few users within the organization who know and understand the role capabilities/responsibilities and who need the ability to see all the cases associated with the organization. This allows the user to monitor and adjust caseloads and kynector assignments and evaluate the program at an organizational level.
Assister	Self-Service Portal	Assister is a kynect benefits role given to Navigators (contracted kynectors) and Certified Application Counselors (non-contracted kynectors) who have successfully onboarded to KOG, taken all required trainings in MyPurpose, and passed the assessments corresponding to all required trainings in MyPurpose.
Assister Training	MyPurpose	Assister Training is a role in MyPurpose given to Navigators (contracted kynectors) and Certified Application Counselors (non-contracted kynectors) who have onboarded to KOG and still need to take the required trainings in MyPurpose.
CHFS SP External Visitors	CHFS SP External Visitors	CHFS SP External Visitor is a role that grants a user access to the CHFS external SharePoint (SP) sites. **Please note**: The CHFS SP External Visitors role is currently no longer active. This role should not be assigned.
Qualified Entity Hospital	Self-Service Portal	Qualified Entity (QE) Hospital is a kynect benefits role. The QE Hospital role allows users to complete the Presumptive Eligibility (PE) or the Breast and Cervical Cancer Treatment Program (BCCTP) application on behalf of a Kentucky Resident. If the Resident is approved, they are granted time-limited Medicaid benefits. **Please note**: kynectors should NOT access the BCCTP application.

3.3 KHBE Administrator Roles

KHBE has **two** different Administrator roles in KOG:

1. **Agency Administrator role**

   - The Agency Administrator role is a kynect role that grants the user a manager's level of access. This role should be given to a few users within the organization who know and understand the role capabilities/responsibilities and who need the ability to see all the cases associated with the organization.
   - This kynect role allows the user to monitor and adjust caseloads and kynector assignments and evaluate the program at an organizational level.

2. **Organization Manager role**

   - Organization Manager role is a role within the KOG system which permits the Managers to add, remove, and update user profiles and assigned roles.
   - This KOG role should be limited to a few users within the Organization who know and understand the responsibilities of this access.
   - Maintaining user accounts is a critical part of ensuring that an organization is in compliance, that search results found in the kynect system are accurate, and that organizations maintain their users in a manner that prevents security incidents.

Some Organization Administrators may have additional levels of system access to assist Presumptive Eligibility (PE) and other applications.

Please note: Most KOG Administrators are provisioned for both roles simultaneously when the permission level is assigned by selecting the "Organization Admin Group" checkbox in KOG.

3.3.1 Organization Management Tile

Once signed into KOG, Organization Administrators have access to the Organization Management tile to manage their assigned organization within KOG.
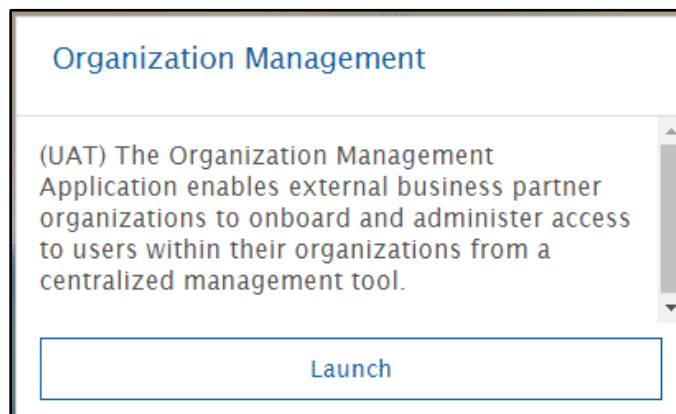
3.3.2 Duties within KOG

Organization Management is the primary tool that grants Organization Administrators access to the KOG system. Some duties include the following:

- Ensuring the accuracy of all organization and organization user data includes contact information, counties serviced, and public vs private settings. These impact the online search results and case association drop-downs in Worker Portal.
- Managing role assignments for all organization users
- Completing annual recertification processes
- Assisting organization users with troubleshooting access and onboarding issues
- Assisting organization users with updating KOG accounts when information changes (e.g., names, email addresses, contact information)

3.4   Inviting kynectors to their Roles in KOG

The process below highlights the appropriate steps Organization Administrators should follow when inviting kynectors to their roles in KOG.

Assigning the Training Role	Inviting kynectors to the Assister Training role must be completed through the Organization Management tile. Once a kynector has been invited, they can access their trainings in the MyPurpose Learning Management System (LMS). Once the kynector receives their invitation, they complete all required KHBE trainings in MyPurpose LMS.
Assigning the kynector role	Invite the kynector to the Assister role in KOG once **all** required trainings have been completed. **Please note**: KOG invitations expire after 48 hours.
kynector responsibilities	kynector invitation responsibilities include: • An approval email is sent to KHBE to approve the kynector role. • KHBE verifies the kynector has completed their KHBE trainings and approves the kynector for their role. • Organization Administrators are responsible for ensuring kynectors have been verified by KHBE and completed all of their required trainings.

3.5   KOG Usage Requirement

Prolonged kynector inactivity in KOG results in the deactivation and removal of the kynector's KOG account. KOG account information is used to populate the kynector search field that is available for Residents' use when they search for kynectors in kynect. Therefore, **it is critical for kynectors to maintain active involvement and keep their information up-to-date in KOG.**

Usage Requirements for KOG		
Login Requirement	**Leave of Absence**	**Account Integrity**
Ninety (90) Day Login Requirement: All kynectors must log into KOG at least once every 90 days or their account is deactivated and their role in the system is removed.	**Leave of Absence Requirement:** All kynectors must notify KHBE in advance if planning to be on leave for more than eight (8) weeks so KHBE may place that user's access in a suspended status. kynectors should email KHBE.Program@ky.gov to provide this notification.	**KOG Account Integrity:** kynectors should never create new KOG accounts if their email or name changes. Instead, kynectors should update their existing KOG account to reflect any new information.

3.6   Organization Administrator Navigation

The following navigation steps walks Organization Administrators through best practices for KOG.

12. Follow the navigation steps highlighted below. Click **Continue**.

13. On the **Details** screen, Organization Administrators are responsible for keeping all organization information up-to-date including email addresses, physical addresses, phone numbers, and primary contacts. Click **Continue**.

14. On the **Recertification Dashboard** screen, Organization Administrators can view pending recertifications for Individuals in their organization. Click **Continue**.

15. Click **Manage Users** tab to navigate to the **Manager Users** screen.

16. The **Manage Users** screen allows Organization Administrators to manage Individuals and their digital access within their organization. Click **Manage**.

17. The **Profile** screen displays the selected Individual's information. This screen must be edited by the selected Individual, but Organization Administrators should confirm the information is accurate. Click **Continue**.

18. Click the **Questions** tab to navigate to the **Questions s**creen.

19. The **Questions** screen can be edited by Organization Administrators or kynectors but Organization Administrators should confirm the accuracy of counties served, public/private settings, and contact information. Click **Continue**.

20. Click the **Roles** tab to navigate to the **Roles** screen.
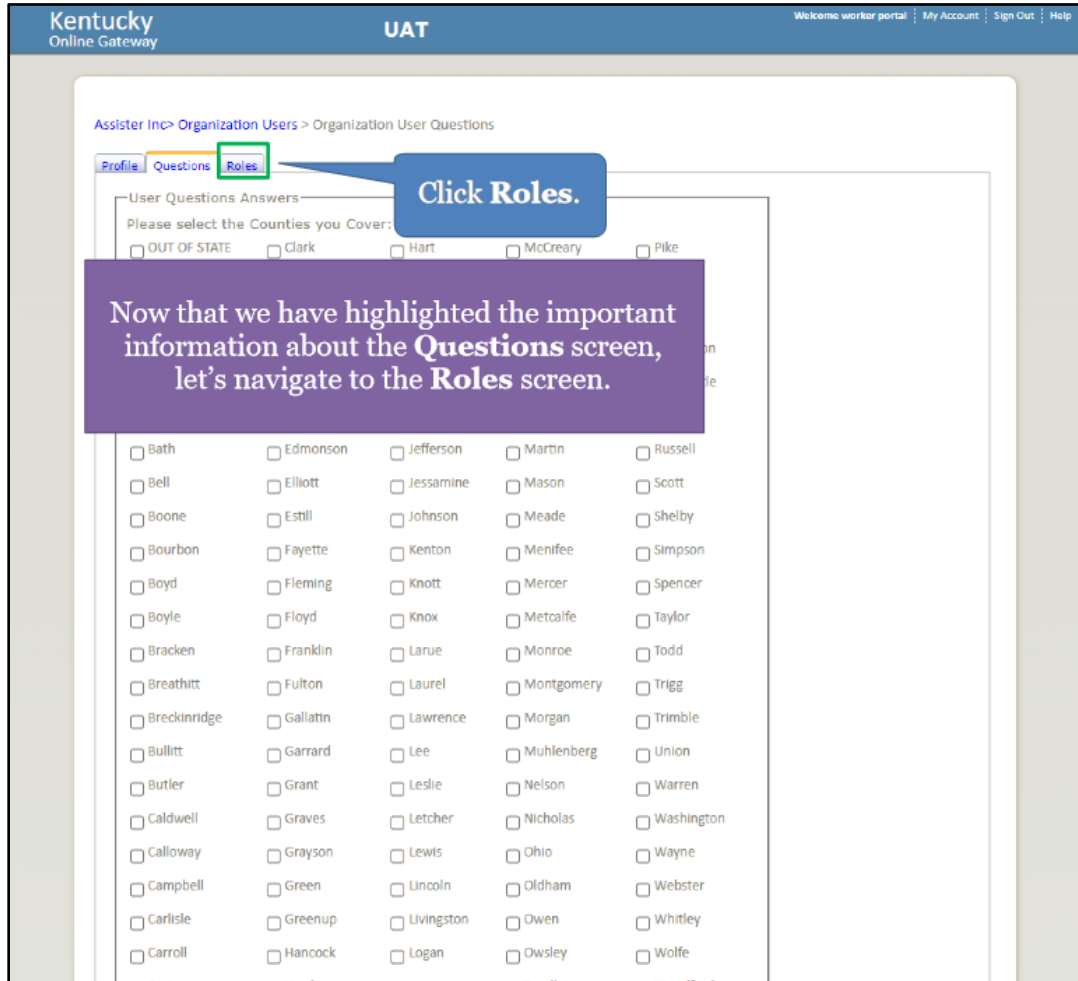
21. The **Roles** screen allows Organization Administrators to change an Individual's role assignments. Click **Remove**.

22. When changing role assignments, the roles must be removed first before inviting the Individual to a new role. Click **Yes**.

23. An example of the email invite for the newly assigned role is listed below. Click **Continue**.

An example of the email invite for the newly assigned role is listed below. Once the Individual clicks the hyperlink to complete the process, they have the updated role given to them by the Organization Administrator.

Continue

Alfie Allen,

worker portal has granted you access to the following roles to participate as a user in an Organization - **Assister Inc**

Application Name: Self Service Portal UAT3
Role Name: Agency Admin

Please follow the below instructions to gain access as a user for this organization. This invitation link would expire and is valid only for a one-time use.

Click here to complete the process

If you need any assistance further, please contact the Kentucky Online Gateway HelpDesk.

Kentucky Online Gateway
Kentucky Online Gateway HelpDesk

NOTE: Do not reply to this email. This email account is only used to send messages.

Privacy Notice: This email message is only for the person it was addressed to. It may contain restricted and private information. You are forbidden to use, tell, show, or send this information without permission. If you are not the person who was supposed to get this message, please destroy all copies.

Click **Continue.**

24. Once the Individual clicks the hyperlink to accept the assigned role, their access will reflect accordingly in KOG. Click the *Click here to complete the process* **hyperlink**.

Alfie Allen,

worker portal has granted you access to the following roles to participate as a user in an Organization - **Assister Inc**

Application Name: Self Service Portal UAT3
Role Name: Agency Admin

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Privacy Notice: This email message is only for the person it was addressed to. It may contain restricted and private information. You are forbidden to use, tell, show, or send this information without permission. If you are not the person who was supposed to get this message, please destroy all copies.

Click the **hyperlink.**

Once the Individual clicks the hyperlink to accept the assigned role, their access will reflect accordingly in KOG.

Click the **hyperlink** to gain access to the new role.

25. This completes the Organization Administrator Navigation. Click **Exit**.
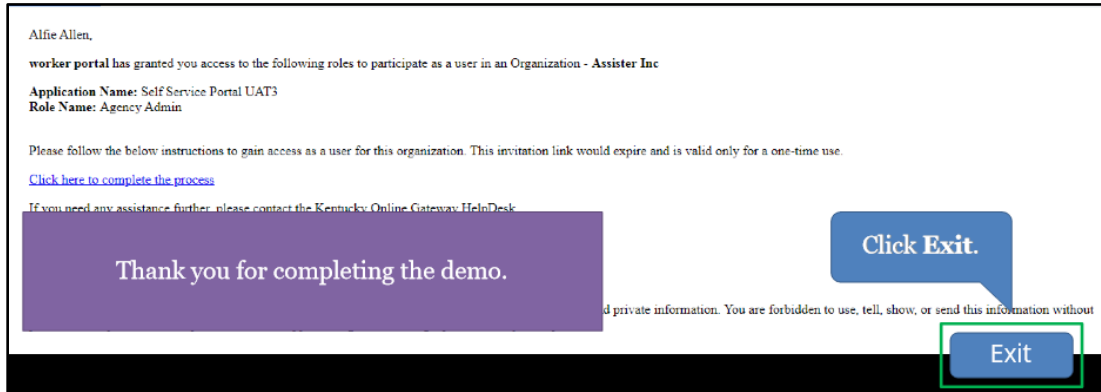
3.7   Updating KOG E-Mail Address Navigation

The navigation steps below walk Organization Administrators through important steps on how to update E-Mail Addresses within KOG.

1. Follow the navigation steps highlighted below. Click the **Profile Name** in the top right-hand corner of the KOG Dashboard.
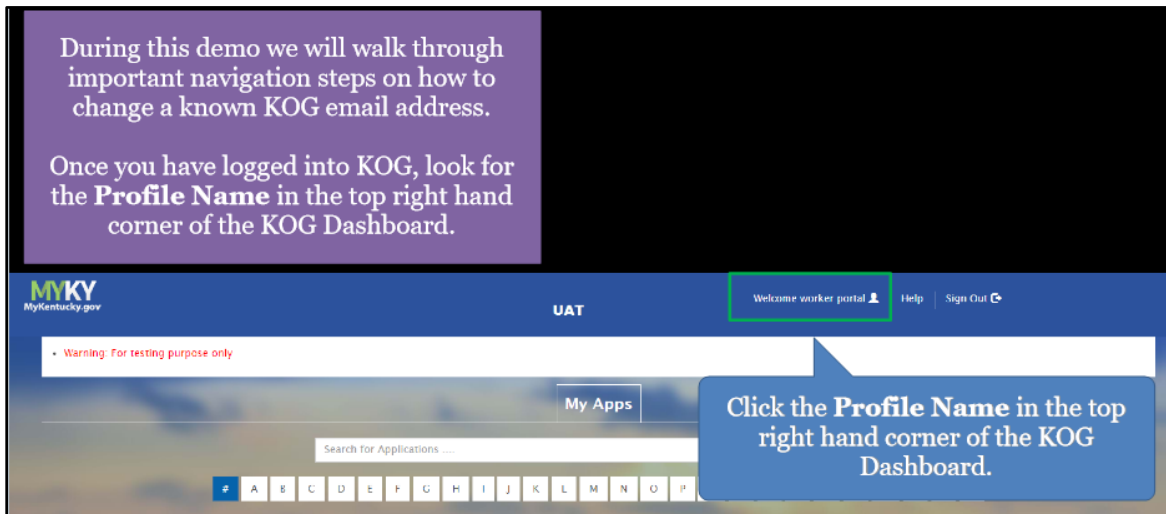
2. On the **My Info** screen, locate the **E-Mail Address** fields from the *User Profile* section. Click the **E-Mail Address** field.

3. Enter your updated E-Mail Address in the **E-Mail Address** field and **Verify E-Mail Address** field to your preferred E-Mail Address.

4. Once the new E-Mail Address is entered and saved, the new E-Mail Address will be updated in KOG. Click **Save**.

5. This completes the Updating KOG E-Mail Address Navigation. Click **Exit**.

4   MyPurpose: KHBE's Learning Management System (LMS)

MyPurpose Learning Management System (LMS) provides a consistent training experience and maintains an online training record for all kynectors.

LMS Purpose
The goal of LMS is to provide a consistent training curriculum and to maintain an online training record for all kynectors.

LMS Objectives
• Increase kynector access to trainings • Improve kynector knowledge and skills • Streamline kynector training process • Track and easily manage kynector training completions

4.1   Required Trainings

Organization Administrators and kynectors are required to complete all mandatory trainings on MyPurpose. Once Administrators confirm completions of all trainings, they may submit a request to add the Assister role to the kynector. KHBE will grant final approval which will permit the user to begin assisting Residents with applying for health coverage.

Required Trainings for kynectors	Required Trainings for Organization Administrators
• State-Based Marketplace (SBM) Certification Training* • New kynector Training • KHBE Privacy and Security Training* • KHBE KI-HIPP Policy Training • Other trainings as assigned ***Requires annual recertification**	• State-Based Marketplace (SBM) Certification Training* • New kynector Training • Organization Administrator Training • KHBE Privacy and Security Training* • KHBE KI-HIPP Policy Training • Other trainings as assigned ***Requires annual recertification**

4.1.1 Training Distribution

Welcome Packets for onboarding kynectors are distributed by Organization Administrators to new kynectors. The Welcome packet contains detailed instructions on how to access the required trainings.

4.1.2 Training Assessment Requirements

All required trainings must be completed before Organization Administrators and kynectors have access to kynect.

Training Assessment Requirements

Organization Administrators and kynectors are required to score **at least 80% on all assessments** within **three attempts** in order to successfully complete the training.

Organization Administrators must contact the KHBE Program Inbox at KHBE.Program@ky.gov for any kynector who has been unsuccessful after their second (2nd) attempt in taking the assessment.

Organization Administrators should confirm with kynectors that they have completed all required trainings prior to submitting a request for user access.

4.1.3 Required Training Tracking for Organization Administrators

Organization Administrators **are not able to view** a kynector's completed courses. However, the KHBE team can confirm the completion of all trainings for kynectors. Therefore, Organization Administrators need to remind kynectors of timely completion and reporting of all their required trainings. Listed below are some reminders Organization Administrators should be aware of:

- Organization Administrators must remind kynectors to track their completed courses and completion certificates through their transcript on MyPurpose LMS. KHBE is able to provide this information to Organization Administrators upon request.
- Organization Administrators should receive confirmation from kynectors confirming that they have completed required trainings and passed the assessments.
- Failure to comply with training requirements may result in the loss of system access for one (1) year from the date of removal for non-compliance.

4.2   MyPurpose Resources

Resources have been identified for kynectors based on the communication strategy for kynectors. The following resources are available on KHBE.ky.gov.

Welcome Packet	The Welcome Packet for onboarding kynectors is distributed by Organization Administrators to new kynectors. The Welcome Packet contains detailed instructions on how to onboard to KOG and access required trainings.
MyPurpose LMS Quick Reference Guide	This quick reference guide helps Organization Administrators and kynectors address questions in accessing MyPurpose LMS as well as with the viewing and completing required trainings.
MyPurpose LMS FAQ	This quick reference guide is primarily for Organization Administrators to distribute to kynectors for general issues that may arise when using MyPurpose.

4.2.1   Accessing KHBE Resources

Resources are available to Organization Administrators and kynectors on KHBE.ky.gov in the **Agents & kynectors** tab. See below instructions on how to access resources on KHBE.ky.gov.

kynector Training Materials Tab Navigation Instructions
1. Access KHBE.ky.gov.
2. Select the Agents and kynectors tab.
3. From the drop-down, select kynector Training Materials.
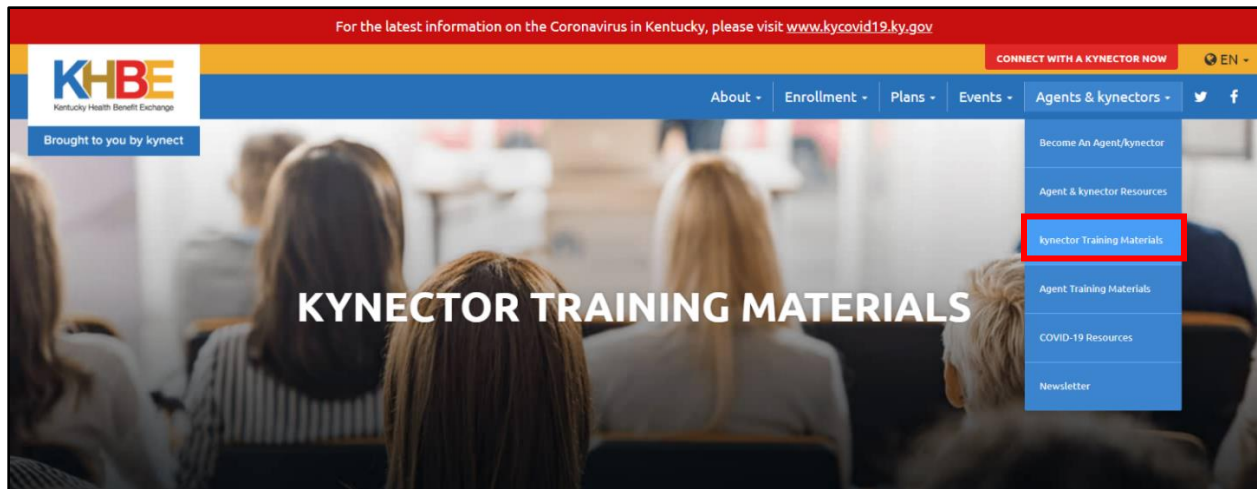
5   Event Responsibilities

Community outreach and enrollment events are important in providing information and services to Residents across the Commonwealth. At these events, either in-person or virtually, kynectors educate Kentucky communities about health coverage and the enrollment process, as well as connect with those Residents who may live in hard-to-reach areas. Organization Administrators provide oversight to ensure these events are properly organized and facilitated correctly.

Please note: Certified Application Counselors (CACs) are not required to host events. However, if CACs host events, they must meet the event criteria mentioned below.

5.1   Outreach Efforts

kynectors and Organization Administrators play a central role in coordinating outreach and enrollment activities throughout the Commonwealth of Kentucky. The Goals of Outreach and Enrollment Events are to:

- Provide outreach and education to target audiences.
- Educate Kentuckians about KHBE and kynect.

5.1.1 Outreach Requirements

Key outreach requirements include:

Outreach Requirements

Utilize existing organization relationships for outreach to Residents.

Educate Individuals about insurance affordability programs (including tax credits, Cost-Sharing Reductions, and Medicaid) and enrollments in Qualified Health Plans (QHPs).

Educate employers on the Small Business Health Options Program (SHOP).

5.1.2 Outreach Standards of Practice

Organization Administrators must adhere to the below outreach standards:

- Obtain prior approval from KHBE for materials used in media and mass communications.
- Provide accurate communications to Residents.
- Submit events to KHBE for approval for the upcoming month **at least five (5) business days prior to the first day** of that month.
- Send in any changes or cancellations to the event schedule as soon as the kynector is made aware.

5.2 Event Types

The different KHBE event types are described below:

1. **Education Events:** Education events provide opportunities to inform Residents and small businesses about Medicaid, Qualified Health Plans (QHPs), Advance Premium Tax Credit (APTC), Cost-Sharing Reductions (CSRs), Kentucky Children's Health Insurance Program (KCHIP), Kentucky Integrated Health Insurance Premium Payment (KI-HIPP) Program, and Small Business Health Options Program (SHOP).

2. **Enrollment Events:** Enrollment events provide opportunities to assist Residents and small businesses in understanding health program enrollment information in order to make the right choice for their families and/or business.

3. **Outreach Events:** These Outreach Events provide opportunities to engage and inform the public about kynect services, legislation (e.g., the American Rescue Plan (ARP)), answer question about the importance of health coverage, and enroll Residents into available health coverage options through Medicaid, QHPs, APTC, CSRs, KCHIP, KI-HIPP, and/or SHOP.

5.3 KHBE Materials and Resources

- **Style Guides**- KHBE and kynect style guides give specific guidance on the requirements for how KHBE and kynect branding and visuals should be displayed.
- **Event Signs and Posters**- Event signs and posters communicate information designed to educate Residents about KHBE and the services available.
- **Flyers and Brochures**- Flyers and brochures are posted on the KHBE website for kynectors to distribute to Residents. kynectors need to print these materials for distribution since they are not intended for electronic distribution.
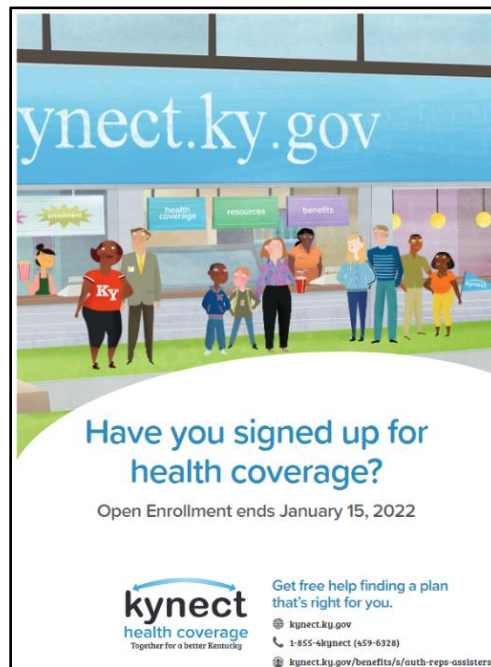
5.4   Event Advertising: Materials and Guidelines

Organization Administrators should direct kynectors to KHBE.ky.gov for advertising and promotion guidelines for their events and outreach.

5.4.1 Event Materials and Advertising Approval Process

The approval process for event materials and advertising materials is as follows:

1. **Review of Submission:** Organization Administrators review edited advertising/promotional materials received from kynectors and make necessary edits for upcoming events. If any changes are made to KHBE materials (besides date/time/location) they are required to be submitted to KHBE.Program@ky.gov for approval.
   - Examples of items which may need approval are:
     - Public service announcements
     - Edited posters from the KHBE website

2. **Turnaround Time:** Organization Administrators should allow **seventy-two (72) hours** for KHBE to review advertising materials.

Please note: Items such as text message campaigns and digital content for publications may require additional time for review by KHBE.

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3. **Approval or Denial:**

   - KHBE reviews the proposed changes to advertising materials and approves or denies the submission.

   - KHBE sends the decision and feedback to Organization Administrators with necessary changes/updates required for materials.

4. **Post Approval:** Once the Organization Administrator receives the approved advertising materials from KHBE, they can be used and distributed as intended.

5.5 Event Calendar Expectations for kynectors

kynectors should regularly check the KHBE events calendar on the KHBE website to be aware of upcoming events. kynectors should submit planned events directly to their Organization Administrator (kynectors do not submit the Event Request Template to KHBE).

	Region	Title	Description	Location	Start Date/Time	End Date/Time	Time Zone	Is Enrollment	Is Education	Application Assister Name	Contact Source
2	Dropdown 1-8	Name of the event	A sentence or two about the event	Building or area event is located	Format MM/DD/YY HH:MM AM/PM	Format MM/DD/YY HH:MM AM/PM	Dropdown EST-CST	Will you take applications. Dropdown Yes/No	Is event education/outreach. Dropdown Yes/No	Assister holding event	Who at the event is your contact person
3	2	Henderson County Housing Authority	Come and join us to learn what health care options are available to you!	Main Entrance	2/3/20 9:00 AM	2/3/20 11:00 AM	CST	No	Yes	Stephanie Bruce	Justina Price
4	2	Homeless Council of Ohio Valley's Homeless Resource Fair	Come join us to learn about health care options available to you! Appointments can be scheduled for application assistance, if needed.	Senior Community Center of Owensboro-Daviess County	2/24/20 1:00 PM	2/24/20 5:00 PM	CST	No	Yes	Seneca Tate	Audrey Sanders
5	2	Homeless Council of Ohio Valley's Homeless Resource Fair	Come join us to learn about health care options available to you! Appointments can be scheduled for application assistance, if needed.	Senior Community Center of Owensboro-Daviess County	2/25/20 1:00 PM	2/25/20 5:00 PM	CST	No	Yes	Seneca Tate	Audrey Sanders

... | Jan | **Feb** | Mar | April | May | Jun | Jul | Aug | Sept | Oct | Nov | Private Events | +

5.5.1 Event Request Template

kynectors must provide all details and information in the Event Request Template to their Organization Administrator when they are planning an event. Organization Administrators are responsible for submitting and sending updates to the Event Request Template to KHBE.

5.5.2 Event Request Template Overview

The following process details how to complete the required fields on the Events Request Template. kynectors must provide all details and information to their Organization Administrators when they are planning an event. All events, public and private, must first be submitted to their Organization Administrator for approval and then added to the Events Calendar.

1. **Top Row:** Top row fields are for designated information regarding the event: region, title, start/end times, etc. and should be completed accordingly. kynectors should provide as much detail as possible regarding the event. For example:

- Name of the event: kynecting to your Health
- Description: A virtual event to discuss heart health, National Wear Red Day, KCHIP and dental health.
- Location: PACS Office
- Start Date/Time: 01/02/20 9:00 AM
- End Date/Time: 01/02/20 12:00 PM

	A	B	C	D	E	F
1	**Region**	**Title**	**Description**	**Location**	**Start Date/Time**	**End Date/Time**
2	Dropdown 1-8	Name of the event	A sentence or two about the event	Building or area event is located	Format MM/DD/YY HH:MM AM/PM	Format MM/DD/YY HH:MM AM/PM
3	2	Henderson County Housing Authority	Come and join us to learn what health care options are available to you!	Main Entrance	2/3/20 9:00 AM	2/3/20 11:00 AM
4	2	Homeless Council of Ohio Valley's Homeless Resource Fair	Come join us to learn about health care options available to you! Appointments can be scheduled for application assistance, if needed.	Senior Community Center of Owensboro-Daviess County	2/24/20 1:00 PM	2/24/20 5:00 PM
5	2	Homeless Council of Ohio Valley's Homeless Resource Fair	Come join us to learn about health care options available to you! Appointments can be scheduled for application assistance, if needed.	Senior Community Center of Owensboro-Daviess County	2/25/20 1:00 PM	2/25/20 5:00 PM

◀ ▶ ... | Jan | **Feb** | Mar | April | May | Jun | Jul | Aug | Sept | Oct | Nov | Private Events | ⊕

2. **Bottom Row:** The bottom row contains different tabs representing the different months.

	A	B	C	D	E	F
1	**Region**	**Title**	**Description**	**Location**	**Start Date/Time**	**End Date/Time**
2	Dropdown 1-8	Name of the event	A sentence or two about the event	Building or area event is located	Format MM/DD/YY HH:MM AM/PM	Format MM/DD/YY HH:MM AM/PM
3	2	Henderson County Housing Authority	Come and join us to learn what health care options are available to you!	Main Entrance	2/3/20 9:00 AM	2/3/20 11:00 AM
4	2	Homeless Council of Ohio Valley's Homeless Resource Fair	Come join us to learn about health care options available to you! Appointments can be scheduled for application assistance, if needed.	Senior Community Center of Owensboro-Daviess County	2/24/20 1:00 PM	2/24/20 5:00 PM
5	2	Homeless Council of Ohio Valley's Homeless Resource Fair	Come join us to learn about health care options available to you! Appointments can be scheduled for application assistance, if needed.	Senior Community Center of Owensboro-Daviess County	2/25/20 1:00 PM	2/25/20 5:00 PM

◄ ... | Jan | **Feb** | Mar | April | May | Jun | Jul | Aug | Sept | Oct | Nov | Private Events | ⊕

3. **Descriptive Rows:** Below the top row are the fields where descriptions and specific information should be provided with as much detail as possible. For example:

- Event Type: Enrollment or education
- kynector name: Jane Doe
- Contact Source Information: John Doe (606) 123-4567
- kynector email: Jane.Doe@ky.gov
- Physical Address: 245 West Water Street Flemingsburg, KY 41041
- Virtual Address: include event link (if applicable)
- Longitude and Latitude: This is required on the Event Request Template whether the event is virtual or in person. It can only have a maximum of 6 decimal points.

	A	B	C	D	E	F
1	**Region**	**Title**	**Description**	**Location**	**Start Date/Time**	**End Date/Time**
2	Dropdown 1-8	Name of the event	A sentence or two about the event	Building or area event is located	Format MM/DD/YY HH:MM AM/PM	Format MM/DD/YY HH:MM AM/PM
3	2	Henderson County Housing Authority	Come and join us to learn what health care options are available to you!	Main Entrance	2/3/20 9:00 AM	2/3/20 11:00 AM
4	2	Homeless Council of Ohio Valley's Homeless Resource Fair	Come join us to learn about health care options available to you! Appointments can be scheduled for application assistance, if needed.	Senior Community Center of Owensboro-Daviess County	2/24/20 1:00 PM	2/24/20 5:00 PM
5	2	Homeless Council of Ohio Valley's Homeless Resource Fair	Come join us to learn about health care options available to you! Appointments can be scheduled for application assistance, if needed.	Senior Community Center of Owensboro-Daviess County	2/25/20 1:00 PM	2/25/20 5:00 PM

◄ ► ... | Jan | **Feb** | Mar | April | May | Jun | Jul | Aug | Sept | Oct | Nov | Private Events | ⊕

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4. **Newly Rescheduled Events:** Newly rescheduled events are highlighted in yellow.

Dropdown 1-8	Name of the event	A sentence or two about the event	Building or area event is located	Format MM/DD/YY HH:MM AM/PM	Format MM/DD/YY HH:MM AM/PM	Dropdown EST-CST
5	Amen House Food Pantry	Education and Outreach will be provided about health care options available.	Georgetown Amen House	4/1/20 9:00 AM	4/1/20 11:00 AM	EST
2	Henderson County Housing Authority	Come and join us to learn what health care options are available to you!	Main Entrance	4/1/20 9:00 AM	4/1/20 11:00 AM	CST
4	Casey County Needs Assessment Meeting	An Assister will be available for questions, and applications after the meeting.	Casey County LCCAA Outreach Office	4/1/20 10:00 AM	4/1/20 11:00 PM	EST

5. **Cancelled Events:** Cancelled events need to be highlighted in green with strikethrough for the originally scheduled event.
   - Weather related cancellations are highlighted in gray with strikethrough for the originally scheduled event. Reasonable efforts should be made to **avoid cancellation of advertised events.**
   - kynectors must notify their assigned Organization Administrator **within three (3) days of the event scheduled date.**
   - Organization Administrators must send notification to KHBE of all possible cancellations.

Region	Title	Description	Location	Start Date/Time	End Date/Time
Dropdown 1-8	Name of the event	A sentence or two about the event	Building or area event is located	Format MM/DD/YY HH:MM AM/PM	Format MM/DD/YY HH:MM AM/PM
5	Amen House Food Pantry	Education and Outreach will be provided about health care options available.	Georgetown Amen House	4/1/20 9:00 AM	4/1/20 11:00 AM
2	Henderson County Housing Authority	Come and join us to learn what health care options are available to you!	Main Entrance	4/1/20 9:00 AM	4/1/20 11:00 AM
4	Casey County Needs Assessment Meeting	An Assister will be available for questions, and applications after the meeting.	Casey County LCCAA Outreach Office	4/1/20 10:00 AM	4/1/20 11:00 PM

6. **Event Request Template Submission:** kynectors submit their completed event request to their assigned Organization Administrator for review. The Organization Administrator reviews, verifies accuracy of the information, and sends to KHBE.

Please note: kynectors do not submit event requests directly to KHBE.

5.5.3 Event Request Template Color Definitions

The event request template color definitions are as follows:

- Newly rescheduled events need to be highlighted in yellow.
- Rescheduled events need to be highlighted in blue with strikethrough for the originally scheduled event.
- An event cancelled for weather, highlight the event row in gray with strikethrough.
- An event is cancelled for any other reason, highlight the event row in green with strikethrough.

5.5.4 Event Request Template Submission Process

Event requests should be filled out completely in the Events Request Template with all required information. All event requests require review from Organization Administrators for accuracy prior to being submitted to KHBE for approval.

The submission process to KHBE is detailed in the steps below:

✔ kynectors submit a completed event request to the Organization Administrator.

✔ Organization Administrator compile event requests into one master template for their entire organization.

✔ Organization Administrator verify submitted information is accurate and color coded properly (if needed).

✔ The compiled master template is saved with the following naming convention:
  - Organization Name, Month, and Event Request Date (e.g., CAK May Event Request 5.19.21

✔ The master template is sent to KHBE at KHBE.Program@ky.gov for review.

Organization Administrators should repeat this process throughout the month as events are changed or added, rename their master copy with the new date, and resend to KHBE at KHBE.Program@ky.gov.

5.5.5 Event Calendar Approval Process

Organization Administrators must review the Events Request Template for accuracy before submitting to KHBE for approval. Event requests submitted with errors are returned and require resubmission.

See below a few key facts about KHBE events:

1. The Events Request Template is tracked via Microsoft Excel and should be completed in its entirely with all required information.
2. The Events Request Template is reviewed for accuracy by Organization Administrators and sent to KHBE.Program@ky.gov for approval.
3. KHBE reviews the Events Request Template and sends their approval/denial decision back to the Organization Administrator.
4. The Events Calendar is published to the KHBE website for public engagement and awareness.

6   Enrollment Event Management

Organization Administrators ensure that kynectors successfully meet their requirement of hosting a **minimum of one (1) successful public event in each county in the region per month**, either in-person or virtually.

6.1   Five Criteria for Successful Events

1. Event is well advertised.
2. Event has appropriate signage throughout the venue.
3. Event is held in locations where Residents and potential Enrollees congregate.
4. Event yields at least ten (10) contacts or two (2) applications.
5. Event is properly staffed "at the table" within reason for the entire scheduled event time.

6.2   Event Management Checklist

The following topics provide a checklist of items and practices that an Organization Administrator must follow for all kynector events.

1. **Advertising/Self-Marketing:** There should be clear signs of promotional advertising of the event using KHBE approved posters and flyers.
   - Organization Administrators should encourage kynectors to solicit cross-promotion and self-marketing opportunities by sending email communications and/or arranging in-person visits with stakeholders and media outlets.

- Self-marketing helps to expand the promotional reach of events and services kynectors offer by collaborating with various media outlets across different mediums.

2. **Signage:** There should be visible posting of KHBE approved materials throughout the event venue to communicate information about the programs and services offered by KHBE.
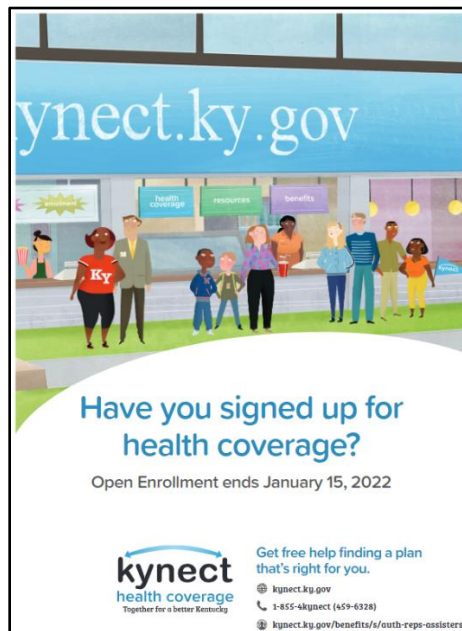
3. **Metric-Driven SMART Goals:** Organization Administrators should encourage kynectors to apply metric-driven SMART Goals to reach targeted interactions of at least ten (10) contacts or two (2) enrollments during their events. The SMART acronym is defined as: Specific, Measurable, Attainable, Relevant, and Time-Bound. These goals should be included in their event planning.

4. **Facilities Requirements:** The physical facility should be an appropriate establishment for sponsoring a KHBE event. The event should be properly staffed and have the minimum facility requirements to meet the needs of Residents for the duration of the event. These requirements include:

- Wi-Fi and network connectivity (secure)
- Restroom access
- Appropriate seating availability
- Accessibility for persons with disabilities
- Set the scene:
    - Remove excess clutter from the area
    - Present in a quiet area free from background noise

The above topics help define the requirements for what is considered a successful public events.

Please note: Organization Administrators can find which counties are assigned to them in the Organization Management portal within KOG.

6.3   Outreach and Enrollment

Community outreach and enrollment events are public facing events and should be handled accordingly.

- It is important that kynectors take certain measures and actions to ensure a successful event.
- Additionally, Organization Administrators must provide oversight for these events to confirm they are properly organized and facilitated correctly.

Below are best practices Organization Administrators should utilize so events are both successful and compliant.

HIPAA Compliance	Maintain HIPAA compliance standards. For detailed information about HIPAA please visit the U.S. Department of Health and Human Services: https://www.hhs.gov/hipaa/index.html
Create metric-driven SMART Goals	Have expectations to reach at least ten (10) contacts or two (2) applications per event.
kynector Oversight	Confirm kynectors complete metrics reporting after every event.

6.4   In-person Events

There is a tremendous value for participants to attend an in-person event. Therefore, kynectors should thoroughly plan and advertise the event. Organization Administrators should verify that kynectors are incorporating the following practices as a part of their in-person events:

In-Person Event Best Practices	
Punctuality	Events starting and ending on time is important for those participating at the event and KHBE.
Billing	Billing of time should be accurate for the event and planning efforts.
Branding	All branding should be consistent with current standards and KHBE approved materials should be visible.
Q&A Segments	Question and answer (Q&A) segments are important for engaging participants.
Survey	Call-to-action: Distribute Customer Satisfaction surveys at all events. Customer Satisfaction surveys provide valuable feedback and helps improve future events.

6.5   Virtual Events

Below are some best practices Organization Administrators should verify that kynectors are incorporating as a part of their virtual events.

Virtual Event Best Practices	
Advertise the Event	Event advertisements help Individuals recognize KHBE and the image of the kynector as well as build long-lasting relationships with stakeholders.
Best Time of Day to Broadcast	Set the scene for the virtual presentation in the **same professional manner as an in-person event** by doing the following: • Remove excess clutter from the area • Select a professional background • Present in a quiet area free from background noise • Ensure privacy for the broadcast
Facebook Live Setup	Before going live on Facebook, check the operational setup for the following: 1. Select whether to **Go Live Now** or **Schedule a Live Video** for a future time and date. 2. Select whether broadcasting to a **Page, Group, Event**, or **Profile Timeline.** 3. Add a **Title and Description** to the broadcast. Also tag friends, check into a location, add a feeling, or activity. 4. Select **Audience Settings** to define Age Restrictions and Geographic Gating to apply age restrictions (if necessary). 5. Under Setup, confirm that the correct camera and microphone sources are configured. 6. If sharing the computer screen, select **Start Screen Share** under Setup. 7. Check the internet connection before going live and make any necessary adjustments.
Broadcasting	It is always best practice for kynectors to facilitate a dry run of their events. Practicing before a broadcast can help increase the quality and effectiveness of the event. Try broadcasting to friends or change the privacy settings on the post to **Only Me.** During the virtual event, be sure to incorporate the following practices: • Provide consistent re-introductions of important information throughout the broadcast. • Distribute the broadcast stream including an accessible link and any necessary access passwords for the public to join the broadcast. • When using Zoom, turn off the "Waiting Room" feature in the Zoom settings.

Accommodations for Persons with Disabilities	Visit Facebook's Accessibility Page to utilize the platform's resources in creating an a great experience for all Residents. Below is a checklist of areas to pay attention to regarding accessibility: • Screen readers and assistive technology • Closed captions and media • Text size and contrast

6.6   Post Enrollment Event Management

Organization Administrators should receive detailed metric reports after every event from kynectors. These reports should be sent by kynectors and Organization Administrators must verify that the following items are included:

Reports that require verification

- Number of contacts
- Number of applications
- Summary of kynector interactions
- Event address if in-person or event link if virtual
- Title and description of the event
- Start/end times and point of contact (POC) information
- Required amount of photos of the event

6.7   Issue Escalation Guidelines

If Organization Administrators or kynectors have unresolved issues that require escalation, they should utilize the appropriate escalation path and follow the given resolution process stated by the representative. Below is an escalation pathway guide so that the appropriate helpdesk is being contacted for the specified issue.

Issue Escalation Guidelines
kynect SSP
kynect SSP issues are typically technical access issues such as: • Gaining access/become associated to an active case • Speaking to Department for Community Based Services (DCBS) • Reporting errors received in Self-Service Portal (SSP) Please follow the below criteria when escalating these issues: **Check these materials first:** • kynect training materials on the DMS website: kynect benefits - Cabinet for Health and Family Services • Release Notes • kynector training materials at KHBE.ky.gov **If questions persist, take the following actions:**

- Call the Professional Services Line: 1-855-326-4650 (<u>This number is NOT to be shared with the public</u>).
  - o Information to have prior to the call:
    - o The kynector ID
    - o The case/application number
    - o The Resident available (if they are trying to complete a case association)
  - o Information to obtain from Professional Service Line (PSL) representative:
    - o Ticket number/reference number if it is a system issue
    - o Name of representative who provided assistance
    - o Case/application number of case if newly associated
- For any issue that remains unresolved or requires further escalation, notify KHBE by email KHBE.Program@ky.gov.
- KHBE will review and escalate further as appropriate.
- When emailing KHBE, kynectors and Agents should include the ticket number/reference number from PSL, case number, description of issue, and screenshot of issue. **No personally identifiable information (PII)** can be included in the email.

Department for Medicaid Services

DMS issues are typically related to eligibility requirements for Residents. Please follow the below criteria when escalating these issues:

Check these materials first:
- CHFS Policy Manuals on the DCBS website
- Training manuals on MyPurpose

If questions persist, take the following actions:
- For any issue that remains unresolved or requires further escalation, notify KHBE by email KHBE.Program@ky.gov.
- KHBE will review and escalate further as appropriate.

Dire Need Issue

Dire Need issues are those requiring attention within a 24-hour period. Please follow the below criteria when escalating these issues:

Check these materials first:
- KHBE Insight Newsletters

If questions persist, take the following actions:
- For any issue that remains unresolved or requires further escalation, notify KHBE by email kynectdireneed@ky.gov.
- When emailing the KHBE program inbox, "Dire Need" must be typed in the subject line.
  - o Include an explanation of the "Dire Need" in the body of the email and indicate whether the "Dire Need" is for a Medicaid, QHP, or another case.
  - o Communicate the email as quickly as possible to ensure swift action.
- KHBE will review all "Dire Need" emails and escalate as appropriate.

KOG Helpdesk

The KOG Helpdesk should be contacted for account related issues. Please follow the below criteria when escalating these issues:

Check these materials first:
- Agents Welcome Packet
- New kynector Welcome Packet

- kynect benefits KOG Quick Reference Guide

If questions persist, take the following actions:
- These unresolved issues should be emailed to KOGHelpdesk@ky.gov.
- Identity Proofing Forms for Agents and kynectors should be emailed to KHBE.Program@ky.gov.
- When emailing KHBE, kynectors and Agents should include the ticket number/reference number from PSL, case number, description of issue, and screenshot of issue. **No personally identifiable information (PII)** can be included in the email.

6.8   Issue Escalation Guidelines

The graphic below highlights the escalation process for Agents and kynectors. Be sure to reference this resource and take the recommended steps if any issues outlined below are experienced.

kynector and Agent Escalation Process		
Helpdesk Issue Escalation	**Check These Materials First**	**I still have questions, who do I contact?**
Self-Service Portal (SSP) Issues		
SSP Issues are typically technical access issues	• kynect training materials on the DMS website: kynect benefits - Cabinet for Health and Family Services • Release Notes • kynector training materials at KHBE.ky.gov	• Call the Professional Services Line: 1-855-326-4650. • For any issue that remains unresolved or requires further escalation, notify KHBE by email KHBE.Program@ky.gov. • KHBE will review and escalate further as appropriate. • When emailing KHBE, kynectors and Agents should include ticket number from PSL, case number, description of issue, and screenshot of issue. No PII can be included in the email.
Department for Medicaid Services (DMS) Issues		
DMS Issues are typically related to eligibility requirements for Residents	• CHFS Policy Manuals on the DCBS website • Training materials in MyPurpose LMS	• For any issue that remains unresolved or requires further escalation, notify KHBE by email KHBE.Program@ky.gov. • KHBE will review and escalate further as appropriate.
Dire Need Issues		
Dire Need issues are those requiring attention within a 24-hour period	• Newsletter page on the KHBE website	• Email kynectdireneed@ky.gov for Dire Need issues. • kynectors should use the subject line "Dire Need" and indicate whether the Dire Need is for a Medicaid, Qualified Health Plan (QHP), or another case. • KHBE determines appropriate response agency for escalation.
KOG Helpdesk		
Contact for KOG account related issues	• Agents Welcome Packet • New kynector Welcome Packet • kynect benefits KOG Quick Reference Guide • Training materials in MyPurpose LMS	• These unresolved issues should be emailed to KOGHelpdesk@ky.gov. • When emailing the KOG helpdesk, agents and kynectors should include a brief description and screenshot of the issue. No Personally Identifiable Information (PII) can be included in the email.
All Other Issues		
Always reach out to the appropriate helpdesk. If the issue remains unresolved after reaching out to the helpdesk, it should then be escalated to KHBE.Program@ky.gov.		

7   Organization Administrator Assessment

1. What are some examples of reporting data that kynectors should include in their metrics reports?
    a. Total number of "no shows"
    b. Number of breaks provided during the event
    c. Email addresses of all points-of-contact for the venue
    d. Type of event (virtual or in-person) and total funds used on outreach activities

2. Which of the following is a reporting metric that Organization Administrators do not have to report?
    a. Monthly Event Request Templates
    b. Timesheets
    c. Number of social media followers
    d. Purchase order requests

3. Which tile in KOG allows Organization Administrators to manage their assigned organization?
    a. Assign New People
    b. Organization Management
    c. Exit Users
    d. Delete Users

4. Once the kynector has completed the required KHBE trainings in MyPurpose, the kynector is invited by their Organization Manager to their Assister role in _____.
    a. kynect
    b. KOG
    c. DCBS
    d. Outlook

5. What is the name of KHBE's Learning Management System (LMS) where Organization Administrators and kynectors access required trainings?
    a. Medicaid
    b. MyPurpose
    c. KCHIP
    d. HealthCare.gov

6. Where can Organization Administrators and kynectors access the MyPurpose Quick Reference Guide and FAQ?
    a. KHBE.ky.gov
    b. kynect
    c. CMS
    d. KOG

7. How should kynectors track their completed courses and completion certificates on MyPurpose LMS?

    a. Through their KOG account
    b. Via shared Excel spreadsheet
    c. Through their MyPurpose transcript
    d. Tracking not required

8. Which of the following is NOT a type of KHBE event?
    a. Education Event
    b. Outreach Event
    c. Enrollment Event
    d. Kentucky's Works Program Assessment

9. Where can kynectors find access to style guides, event signs, posters, flyers, and brochures?
    a. KHBE website (Agent and kynector Resources page)
    b. MyPurpose LMS
    c. KOG dashboard
    d. kynect benefits dashboard

10. How are weather related cancelled events annotated on the KHBE events calendar?
    a. Highlighted in yellow with strikethrough
    b. Un-highlighted with strikethrough
    c. Strikethrough only
    d. Highlighted in gray with strikethrough

11. Which of the following is a best practice that should be implemented at BOTH in-person and virtual events?
    a. Make sure Facebook Live is properly set up
    b. Accommodate individuals with disabilities
    c. Do not create or distribute promotional materials
    d. Do no practice before the event

12. Which organization makes the determination to escalate Resident issues to the appropriate channels?
    a. The Resident
    b. KHBE
    c. CPS
    d. SSA

13. Organization Administrators ensure that kynectors successfully meet their requirement of hosting a _____, either in-person or virtually.
    a. Knowledge transfer
    b. Minimum of one (1) successful public event in each county in the region per month
    c. Working group session
    d. KHBE giveaway